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ABSTRACT

This guide was developed for fiscal policy team members to familiarize them with district policies, processes, available data, mandated responsibilities, and other requirements essential to federal and state funded school nutrition program operations. The guide is divided into nine sections: (1) organization and administration; (2) human resources management; (3) nutrition and health; (4) meal planning; (5) purchasing, storage, and distribution; (6) financial management; (7) marketing and promotion; (8) sanitation and safety; and (9) facilities and equipment. Each section contains an introductory statement, a school nutrition goal, and one or more standards that serve as reference points against which current district practices may be assessed. (JD)

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for School District Fiscal Policy Teams

Standards of Excellence for School Nutrition Programs

SP 031 410

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A Self-Assessment Guide
for School District Fiscal Policy Teams

Standards of Excellence for School Nutrition Programs

Prepared under the direction of the

Field Services Branch
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Preface

Previous guides focused primarily on the fiscal affairs of a school district. This guide includes a number of program elements as well. It is important to develop an awareness of program needs and fiscal realities in assessing school nutrition programs. Many factors contribute to the fiscal success or failure of those programs. This guide focuses attention on the basic and unique elements that contribute to excellence in school nutrition programs. It may be used to assist the fiscal policy team in identifying program strengths and weaknesses. It may also be used as a basis for developing and implementing a plan of action for achieving excellence in school nutrition.

There is a clear relationship between healthful, nutritious foods and student performance in the classroom. A recent study indicates that achievement test scores increased when students participated in school nutrition programs. Schools have the opportunity to improve the eating habits and health of children in California by reinforcing classroom nutrition education activities and providing healthful foods. Every school nutrition program is an integral part of the education process and is truly a partner in education.

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Introduction to the Guide

This guide has been prepared to assist the school district governing board, the district superintendent, the district's chief business official, and other fiscal policy team members in assessing the current standards and practices of school nutrition programs in relation to the total school program. The quality program practices described in this guide are designed to stimulate discussion among members of the fiscal policy team about the operation of the district's school nutrition programs and to help the team make improvements in those programs. Team members should realize that progress requires a certain amount of time and planning.

Background in School Nutrition

The federal National School Lunch Program and School Breakfast Program were established to safeguard the health and well-being of the nation's children. These federal programs are administered by the California State Department of Education under the auspices of the United States Department of Agriculture (USDA). USDA promulgates rules and regulations that must be followed by each school nutrition program as a condition of receiving reimbursements. These rules and regulations are extensive and prescriptive. In addition, California law mandates that each school district provide a nutritionally adequate meal each school day for each needy student (*Education Code* Section 49550). Participation in the National School Lunch Program satisfies the state mandate. Except for local food sales, 90 percent of the funding for these programs is provided by the federal government and 10 percent by the state.

Funding from federal and state sources is generated via a monthly claim for reimbursement. Earnings are based on the number of meals served that meet specified nutritional standards. Reimbursement rates vary according to the eligibility of the children served. Those who qualify for free meals generate a higher reimbursement per meal than

those who qualify for a reduced-price meal. Children who pay for their meals generate a small per meal reimbursement which in total provides critical funding for the program's basic infrastructure. Eligibility for a free or reduced-price meal is determined by family size and income. Families must apply annually to be eligible.

Note: The cafeteria fund or account is restricted. All funds that accrue to school nutrition programs are required by federal regulations to be used for the benefit of the school nutrition programs except for reasonable indirect costs. Funds may not be diverted for other purposes.

It is important that the child's eligiblity be determined correctly. Federal regulations require that a fiscal sanction be levied for *any* violation of the four performance standards. These standards specify expectations for eligibility applications, meal claiming systems, meal counting systems, and meal components. The Department of Education performs assessement, improvement, and monitoring system reviews once every four years to determine compliance with federal regulations. Fiscal sanctions may be assessed at this time.

These programs are designed to provide nutritious, reasonably priced meals, contribute to a better understanding of good nutrition, and foster good eating habits. School nutrition programs have become a basic part of the educational program in California.

Fiscal Policy Team

The idea of a *fiscal policy team* grew from discussions focused on the following questions:

- How can school districts improve their overall budget and financial planning ?
- Who needs to be involved in the financial planning process?
- How can board members and administrators work together in the planning process?

From these discussions it became clear that a team approach is necessary for the district to manage its affairs successfully. Team membership will vary according to the size of the district, the specific topics being discussed, and, most importantly, the needs and demands of the district.

In most districts the team should include, at a minimum, a member of the governing board, the superintendent, and the person responsible for business services. The director of the school nutrition programs is a critical participant when these programs are being discussed. In smaller districts the team might also include the lead person in its nutrition program or an appropriate staff member from the office of the county superintendent of schools.

Roles of Team Members

Members of the team play significant but different roles in the assessment process. These roles may change as the concept of the fiscal policy team is modified to meet the needs of the district. Team members have varying responsibilities according to their positions and bring unique skills and personal interest to the planning process. It is important that all team members maintain a broad level of interest in the process so that all points of view can be integrated into final decisions.

The *governing board member* is responsible for developing policies, establishing board goals consistent with the financial condition of the district, and assisting in the determination of district priorities.

The *superintendent* is responsible for implementing board policies and directing management and staff in the assessment of overall district needs, reporting to the board the status of current and proposed laws and regulations that affect the district, and coordinating the fiscal policy team planning process.

The *chief business official* is responsible for providing current and projected financial information for both the school nutrition program operations and the district as a whole.

The *director of school nutrition programs* is responsible for the overall day-to-day management of the school nutrition programs, conducting an assessment of the district's current operating of the programs, providing for projected operational and fiscal needs, and recommending options and alternatives to identified school nutrition issues.

Suggested Use of the Guide

This guide should be read independently by all fiscal policy team members so that they can determine their own familiarity with a district's policies, processes, available data, mandated responsibilities, and other requirements essential to school nutrition program operations. They should then come together for a discussion or series of discussions of each member's assessment of the district's school nutrition program operations. These discussions will, over time, enable the team to establish a common vocabulary, develop increased knowledge of the district's school nutrition program operations, and provide a basis for working together as an effective team.

The guide is divided into nine sections:

I. Organization and Administration
II. Human Resources Management
III. Nutrition and Health
IV. Meal Planning
V. Purchasing, Storage, and Distribution
VI. Financial Management
VII. Marketing and Promotion
VIII. Sanitation and Safety
IX. Facilities and Equipment

Each section contains an introductory statement, a school nutrition goal, and one or more standards that serve as reference points against which current district practices may be assessed. The questions that follow each standard should be used to guide the discussion. Each member of the nutrition fiscal policy team should respond independently according to his or her best judgment of the district's policies and practices.

Upon completion of the questions in each section, the team members should compare answers and use the results as a basis for an in-depth discussion. To facilitate resolution of differences and communication among the members, the team should focus on questions to which any member responds negatively.

The discussion is expected to rely heavily on the chief business official, the school nutrition program director, or the person most knowledgeable about the programs. These individuals are expected to have reviewed the questions well in advance and to have gathered necessary data and reports for review during the discussion.

The team should complete work on each section before moving on to the next section. *The questions are meant to facilitate movement toward improving the operation of the district's school nutrition programs.* These discussions should result in decisions necessary for the district to achieve its financial, nutritional, and educational goals and objectives.

Each member of the policy team should respond to the questions with a *Yes* or *No* answer according to his or her best judgment.

Section I
Organization and Administration

Effective school nutrition programs must use all available resources—people, materials, and facilities—to the fullest. Successful programs are organized and managed on sound business principles and provide nutritious meals that students enjoy. In addition, successful programs require that the governing board, the school administration, and the school nutrition program director agree on a consistent philosophy. Team members need to understand one another's organizational and administrative needs and processes. Every school nutrition program is not to be construed solely as a fiscal entity but as a partner in the district's educational program.

GOAL: To provide an organizational structure that effectively controls the resources of the district and provides predetermined services to students

Yes	No

1. **Standard: The governing board and the school administration have adopted written policies and procedures that allow for efficient program operations. Policies established must meet local needs and comply with the regulations of the U.S. Department of Agriculture and the California State Department of Education.**

   - Do the school nutrition programs have a nutrition philosophy statement and defined organizational values?

Yes	No

- Have written policies been provided for all aspects of the programs, including personnel administration, facilities planning, financial management, student and community services, and competitive food sales?
- Are accurate, thorough, and up-to-date job descriptions available for each position in the school nutrition programs?

2. **Standard: The school nutrition programs have written plans to achieve the goals and objectives developed to meet current program priorities and future needs.**
   - Are the school nutrition program goals and objectives developed jointly by program staff and school business officials and administrators?
   - Are the school nutrition program goals and objectives specific and measurable, and are they evaluated regularly?
3. **Standard: The school nutrition programs have a clear organization structure and lines of authority. These are reflected in the food service organization charts and job descriptions, which are reviewed annually and revised as necessary.**
   - Do the school nutrition programs have a written organizational chart showing clear lines of authority?
   - Has the school administration clearly identified the position within the district to which responsibility for the school nutrition programs is assigned?

Section II
Human Resources Management

Managing people is one of the most challenging jobs in a school district. Attitudes, abilities, desires, and interests influence the success or failure of any operation, including school nutrition programs. Management must set clear work standards and effectively supervise people to ensure that the standards are met. Consistently recognizing excellent performance is effective in helping employees attain peak performance.

Human resources management includes recruiting and hiring qualified personnel, maintaining personnel records, establishing work standards, and providing training activities for employees. Districts should make available advancement opportunities for the school nutrition program employees who want to be promoted and who complete specific training programs.

GOAL: To maintain a staff of school nutrition program personnel capable of accomplishing program goals and objectives

1. **Standard: To meet the needs of each school site, the administration has established a staffing formula that includes provisions for:**

   a. **Breakfast, lunch, and a la carte programs that are implemented at each site**

	Yes	No
b. Factors that influence the amount of labor needed: number of meals served, menus, type of food used, number and length of lunch periods, and kinds and arrangements of equipment (e.g., use of disposables versus nondisposable dishes) c. Efficiently distributing part-time and full-time labor hours during peak times d. Flexibility in determining the length of the working day		
• Has the governing board adopted a staffing policy that addresses procedures for allocating school nutrition program staff at each school site?		
2. **Standard: A governing board policy provides for salary increases according to length of service, merit, and job responsibilities. Wage and salary scales for school nutrition program personnel are reviewed annually and include area rate comparisons and job comparability.**		
• Is an equitable and competitive wage, salary, and fringe benefit system maintained and communicated to all school nutrition program employees?		
3. **Standard: An employee handbook with job descriptions for each school nutrition program position and performance standards is distributed to new employees during an orientation program. Performance reviews of all school nutrition program employees are conducted annually or periodically as called for in a union contract.**		
• Is there a formal evaluation process that measures job performance?		
• Is there an orientation program for all new employees that provides job descriptions and describes the performance review process?		

	Yes	No
4. Standard: School nutrition program employees must be offered opportunities for growth and promotion. Training, if considered a priority, will produce increased job satisfaction, higher productivity, less absenteeism, fewer accidents, and reduced labor turnover.		
• Are training opportunities consistent with the developmental needs of the employees, including professional management training for supervisors and managers?		
• Are employees encouraged to participate in staff development activities, and are they rewarded for so doing?		
5. Standard: A systematic program has been established to recognize excellent job performance throughout the year.		
• Are employees consistently recognized, formally and informally, for exceptional job performance?		

Section III
Nutrition and Health

School nutrition programs provide meals that meet the nutritional and health needs of students and create a learning environment in which students may develop lifetime skills in the selection of a healthy diet. Menu choices reinforce the principles of a nutritious diet. Nutrition education is the process through which students develop the knowledge and skills needed to make wise food choices that promote good health and prevent the onset of chronic disease. Nutrition education activities provide school nutrition staff, teachers, and parents with information on nutrition issues that helps them be more responsive to students.

GOAL: To provide food that meets students' nutritional needs and to reinforce healthy eating habits that students will maintain throughout their lives

1. **Standard: A nutrition policy adopted by the school district governing board reflects the philosophy and values of the district and includes statements about:**
   a. **Food quality. Food should be safe and wholesome and should be purchased from high-quality sources known to the purchaser.**
   b. **Nutritional content. Meals should meet federal meal requirements and should reflect the *Dietary Guidelines for Americans* (USDA).**
   c. **Food acceptability. Food choices should be acceptable to students, and ethnic and cultural preferences should be considered.**

	Yes	No
d. School breakfast. Districts should consider providing a school breakfast program so that children who come to school hungry will, when fed, stay alert and learn.		
• Has the governing board developed a nutrition philosophy and values statement, with contributions from school administration and school nutrition personnel?		
• Does the policy address food quality, nutritional content, and food acceptability?		
• Does the policy apply to the sale of food by students or adults as a fund-raising activity as well as school nutrition programs?		
• Has the school district determined a need for a nutritionally adquate breakfast?		
• Do the educational goals and objectives of the district address the relationship of hunger, nutrition, and learning?		
2. Standard: District nutrition programs should have nutrition education and training activities for school nutrition personnel.		
• Does the district have a professional development program that includes nutrition education and training activities?		
3. Standard: Nutrition education is integrated into classroom subject areas and provides instruction in the nutritional value of food and its relationship to health. School nutrition program personnel and teachers work together to implement nutrition education activities in the classroom and in the food service facility.		
• Do school nutrition program personnel and teachers work together to implement nutrition education activities?		

- Are the meals offered to students examples of healthy, nutritious diets that allow students to practice making good food choices?
- Is the nutritional integrity of the school nutrition program protected by a policy on competitive food sales?

Yes	No

Section IV
Meal Planning

Management of the school district's meal planning and production is a very demanding task for the school nutrition program director, given the various aspects which must be considered to provide quality school nutrition programs. These aspects include planning meals that meet the nutritional needs of students, exemplify the *Dietary Guidelines for Americans* (USDA), and help students develop good eating habits. Maximum participation can be achieved if the food is acceptable to students, reflects cultural preferences, and is reasonably priced and attractively presented. Proper sanitation and safety practices also contribute to maximum participation.

The meal planning task is especially complicated when one considers the difficulty of consistently preparing acceptable, attractive, and healthy meals to a student clientele over the school year. It is difficult to satisfy anyone who eats in the same establishment 180 times per year. The daily challenge is formidable.

GOAL: To provide healthy, nutritious, and appetizing meals through effective and efficient management

Yes	No

Standard: The school nutrition programs plan and maintain records that meet USDA nutritional requirements and provide healthy, appealing menus that reflect the *Dietary Guidelines for Americans.*

- Do the school nutrition programs maintain master files on menus and amounts of foods served, recipes, menu nutrient analysis, USDA-donated foods and processed donated foods, and special cultural and dietary needs?

	Yes	No
• Do the school nutrition programs have accurate meal production records, advance planning data, posted work schedules, and efficient food preparation and service practices?		
• Has the fat, sodium, and sugar content of foods been considered in the development of school recipes and menus to exemplify the *Dietary Guidelines for Americans* ?		
• Are breakfast menus planned so that wise food choices are reinforced and lunch menus are not duplicated?		
• Are menus planned to meet the federal performance standard for required components?		

Section V
Purchasing, Storage, and Distribution

Effective procurement practice ensures that the best food, supplies, and equipment are obtained at the most reasonable cost. Guidelines for ethical procurement procedures should be accessible in written form, should be followed, and should be reviewed periodically. These procedures describe factors that influence decisions on purchasing specifications, available inventory, and scheduling of purchases.

The school nutrition programs director and the district purchasing staff should work closely together to coordinate procurement of food, supplies, and equipment. However, the ultimate responsibility for procurement should reside with the school nutrition programs director.

GOAL: To provide a cost-effective purchasing, storage, and distribution system that ensures the availability of quality items and services

Yes	No

1. **Standard: Policies and procedures are established for all procurement activities.**
   - Are purchases coordinated with menus, inventory, and production schedules?
   - Is there appropriate security for storage areas at school and district receiving sites?
   - Is product and supply usage recorded to provide information for cost control and for future planning?

	Yes	No
2. Standard: Purchasing specifications used in the procurement of services, products, and equipment are readily available to purveyors.		
• Do specifications for processed foods address the fat, sodium, and sugar content of the products?		
• Are purchasing specifications reviewed regularly and modified as needed to account for supply, quality, price, and other relevant factors?		
• Are purchased items evaluated periodically for compliance with specifications, product quality, delivery, and vendor performance?		
3. Standard: Procurement procedures are designed to encourage competition.		
• Is every effort made to receive a quote or bid from at least two suppliers?		

Section VI
Financial Management

Sound financial management practices produce fully accountable school nutrition programs through appropriate cost-containment measures and revenue-generating activities. A quality school nutrition program budget reflects cost-reducing strategies while meeting the needs of students. The fiscal solvency of school nutrition programs depends on revenue received from federal and state sources for the meals consumed by students. Therefore, it is important to recognize that student acceptance of meals can influence financial management practices and vice versa. Unlike the general budget, which projects revenue from average daily attendance, the school nutrition program budget relies on daily student participation. Every meal served generates revenue, and the quality of service is assessed every day through the students by their decision to eat or not eat foods offered. Their failure to participate directly influences financial projections.

The school nutrition program budget projects revenues and expenses on the basis of student participation, staffing, cost-of-living adjustments, seasonal price fluctuations for food and supplies, and anticipated federal and state reimbursement rate adjustments. The budget may be affected by unanticipated circumstances, such as market conditions, competitive food sales, bargaining unit contract negotiations, and school and transportation schedules. These circumstances may result in expenditures temporarily exceeding revenue and a negative cash flow. The district's general fund may be required to subsidize the school nutrition program operations in order to maintain a quality meal service for children. It may be a mistake to reduce staff (food servers) as a mechanism to balance the budget because inadequate staff service to children reduces student participation and erodes revenues. Conversely, school nutrition encroachment into the general fund should be cause for a thorough review of school nutrition operations.

GOAL: To adhere to a school nutrition program budget that reflects the estimated revenues and expenditures needed to meet identified fiscal responsibilities and is used to exercise managerial control over available resources (Programs should be fiscally sound.)

Yes	No

1. **Standard: Revenue is projected according to the following:**

   a. Estimated rates of participation by students
   b. Federal and state rates of reimbursement
   c. A la carte sales and other cash revenue sources

   Revenue sources are best safeguarded when written procedures are developed and followed for collecting and depositing monies and for accurately recording and reporting the number of meals served. Daily bank deposits should be reconciled against supporting documentation for verifying the amount of cash collected. Procedures for cash collection should provide safety for the individuals involved and security for the funds.

• Is the annual school nutrition program budget adopted prior to the beginning of the fiscal year, and does the budget reflect all possible revenue sources and expenditures?	
• Do the school nutrition programs have written procedures for accurately counting the number of meals served by category of child as well as a procedure for ensuring that an accurate claim for reimbursement is produced and filed in a timely manner?	
• Is the reporting of cash collection, meal categories, and menu production records uniform, timely, and accurate at the school and district levels?	
• Does the school nutrition program staff determine accurately the eligibility of students for free or reduced-price meals? (**Note:** Incorrect determinations will result in fiscal sanctions.)	

	Yes	No
2. Standard: Expenditures are estimated on the basis of the following: **a. Food, supply, and equipment costs** **b. Estimated labor and benefit costs** **c. Utility costs** **d. Historical data** **e. Fund balance reserve** **Cost analysis is a method of evaluating expenditures for the purpose of remaining within the budget projections.**		
• Does the school nutrition program budget include realistic projections of all identifiable costs?		
• Do the school nutrition programs have a management information system for daily and monthly analyses of the budget, inventory, and annual projections?		
3. Standard: The distict's school nutrition programs should be self-supporting and maintain adequate reserves.		
• Do the school nutrition programs operate in the black?		
• If not, has a thorough review been conducted that includes an analysis of student participation and use of funds?		
• Are school nutrition program funds used for any purpose other than to operate the school nutrition programs?		
• Does the district maintain adequate reserves for cash flow and equipment replacement?		

Section VII
Marketing and Promotion

School nutrition programs compete with a variety of other food concessions. To be successful, a school nutrition program operation must promote a positive image in a school district by quickly and efficiently serving food that students like in a pleasant and courteous setting. This task is difficult and requires good marketing and promotion techniques. As mentioned in Section VI, "Financial Management," student participation directly affects the financial condition of school nutrition programs. Successful marketing activities are critical.

Many issues affect the functioning of the school nutrition program. Funding cuts, changes in meal requirements, and new and revised federal regulations are constant concerns. The school nutrition program director should keep district administrators informed of issues affecting the school nutrition program.

GOAL: To promote a positive image of the district's school nutrition programs

Yes	No

1. **Standard: A marketing plan has been developed that identifies specific target audiences and unique messages.**
   - Are a variety of merchandising techniques used to promote the meals?
   - Are special events or meals planned throughout the year to promote the school nutrition programs?

	Yes	No
2. Standard: Student surveys are conducted on nutrition awareness, food preference, and overall program satisfaction. Students should participate in taste testing and new product evaluation.		
• Has a youth advisory council been established?		
• Are students able to comment on school nutrition programs through regular student surveys and product evaluation?		
• Are the results of student surveys used to modify the nutrition program operation so that student participation increases?		
3. Standard: School nutrition program personnel maintain effective communication with school administrators and keep them informed of policies, legislation, and issues affecting school nutrition programs.		
• Do school nutrition employees communicate with the school administrators on issues affecting school nutrition programs?		
• Does the school nutrition program director make periodic presentations to the district governing board?		
• Has each governing board member and school administrator visited the school nutrition programs and eaten a breakfast or lunch?		

Section VIII
Sanitation and Safety

School nutrition programs aim to provide wholesome food prepared under the most sanitary conditions and in the safest environment. Sanitation and safety practices established by the California Uniform Retail Food Facilities Law should be defined by written district procedure and communicated to all school nutrition program personnel. A district monitoring system ensures that proper practices are being followed.

GOAL: To maintain a safe environment and sanitary conditions for food preparation and service

Yes	No

1. **Standard: The school administration has defined sanitation and safety standards.**
   - Does the district have written procedures on safety and sanitation practices that apply to the school nutrition programs as well as classroom and fund-raising activities?
   - Are these procedures communicated to all school district personnel?
   - Are written procedures for medical emergencies, fires, and disasters posted in all district food preparation and service areas?
   - Have all child nutrition personnel been trained in proper sanitation and safety procedures?
   - Has an accident reporting system been established that includes investigation and correction of cause?

Yes	No

2. **Standard: The district has implemented a sanitation and safety self-inspection program to ensure that district standards and procedures are followed.**

   - Has a district self-inspection checklist been developed that designates persons responsible for administering the inspections?
   - Are procedures in place for reporting and correcting deficiencies?

Section IX
Facilities and Equipment

The school facilities plan is a comprehensive planning document that provides for the requirements of all components of the educational facility. It is important that each district implement a facilities planning process so that orderly changes can be implemented as required. For specialized facility requirements, which are normally found in the school nutrition programs components, the best management practice is to involve the school nutrition programs director in all phases of facility planning and development. Typically, there are unique facility specifications and requirements in the school nutrition program component that are best addressed by the school nutrition programs director in consultation with professional architects and engineers. The composition of the facilities planning team should include the school nutrition programs director to ensure that these unique and often complex requirements are adequately addressed.

The facilities and equipment for school nutrition programs must be capable of efficiently producing and serving food to students. Students should expect to have sufficient time to eat their meals and have an attractive, pleasant environment in which the meals can be eaten.

GOAL: To provide attractive, pleasant school nutrition programs facilities that allow for the efficient production and serving of food to students

	Yes	No
1. Standard: The governing board has appointed a school facilities planning team that includes representatives from each educational component, including school nutrition program personnel.		
• Does the school nutrition program director review and approve final design and schematic documents related to facilities for school nutrition programs?		
2. Standard: The governing board has adopted a school facilities plan that adequately addresses the current and future requirements of the school nutrition program component.		
• Are the existing food service facilities capable of accommodating anticipated future growth?		
• Are the existing food service facilities being used to accommodate other programs, such as community events and meetings of senior citizens and scouts?		
• Have written policies and procedures been developed for persons who are not food service employees to use food service facilities?		
3. Standard: Existing preparation and serving equipment and facilities allow for the efficient production and service of food.		
• Are existing equipment and facilities conducive to high productivity by school nutrition programs staff in producing and serving food?		
• Do existing equipment and facilities allow for foods to be served efficiently and for students to have an adequate amount of time to eat their meals?		
• Do existing facilities provide an adequate amount of space for students to eat their meals?		
• Do existing food service facilities provide an attractive, pleasant atmosphere for eating meals?		

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